

Operational Guidelines

Section II: Organizing Effectively

Establishing Operational Guidelines

Establishing an effective partnership begins by securing administrative approval. Once approved, a written statement of policy regarding the operating guidelines of the partnership should be written to ensure continuity in how the partnership is created and maintained. Formal policies also provide an important foundation if the process is challenged.

Operational guidelines consist of the goals, objectives, rules, and procedures of the partnership. The guidelines are developed initially by the local education agency during the planning and organizing for forming the partnership. During the first or second partnership meeting, the operational guidelines are finalized and adopted.

The operating guidelines should include the following:

- Name and purpose of the partnership
- Number of members
- Manner of selecting members
- Term limitation for membership
- Provision for eliminating inactive members
- School personnel representation at meetings
- Special working groups
- Officers and their duties
- Requirements of meeting minutes
- Number and frequency of meetings
- Length and time of meetings
- Place of meetings
- Preparation of the agenda for meetings
- Method of calling special meetings

See Figure 2.1 for sample operational guidelines.

Figure 2.1
Sample Operational Guidelines

Operational Guidelines

Article I—Name and Purpose

Section 1: The Business/Industry Advisory Committee shall exist only during such time as it may be authorized to serve by the duly constituted school board.

Section 2: The purposes and duties of the named business/industry advisory committee shall be to:

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____

Article II—Business/Industry Advisory Committee Membership

Section 1: Appointments to the Business/Industry Advisory Committee shall be made by (appointing group).

Section 2: The Business/Industry Advisory Committee shall consist of a minimum of (number) members from the related industry in the community.

Section 3: The Business/Industry Advisory Committee membership shall be selected as representative of the interests in the area or region served.

Section 4: The term of appointment for members shall begin on (date).

Section 5: Members shall be appointed for terms for (length of time).

Article III—Leadership

Section 1: The officers of the Business/Industry Advisory Committee shall be the chairperson, vice-chairperson, and other officers as may be required.

Section 2: The election of officers shall be at the (month) meeting each year. The officers shall be elected by a majority vote of the committee membership.

Section 3: The chairperson shall:

- a. preside at all committee meetings;
- b. appoint special subcommittees as the need arises;
- c. work closely with the school staff and administration in organizing committee activities; and,
- d. represent the Business/Industry Advisory Committee at all meetings of the general advisory committee.

Section 4: The vice-chairperson shall perform the duties of the chairperson in his or her absence.

Section 5: The (name) teacher will serve as facilitator. The facilitator shall:

- a. keep records of attendance;
- b. disseminate and organize minutes, meeting notices, agendas, and other documents;
- c. maintain a permanent record of all committee activities.

Article IV—Meetings

Section 1: Number of regular and/or special meetings of the (name) Advisory Committee shall be held during the year.

Section 2: Written notices of committee meetings shall be mailed to all members at least (number) days before each meeting.

Section 3: Meetings shall be no more than (number) hours in length unless such meetings are continued by the vote of committee membership.

Section 4: Agendas shall be prepared and disseminated by the facilitator.

Section 5: Standing or special subcommittees shall be appointed by the chairperson as the need arises.

Article V—Amendments

Section 1: These operational guidelines may be amended by a two-thirds majority vote of active members at any regular committee meeting, provided that notice of such proposed change has been included in the call of the meeting.

Meetings. Meetings should be held on a regular basis. During the group's forming stage, meetings should be held monthly. Once the group is established and depending upon the type of partnership, the number of meetings may decrease to three or four times a year with special meetings called as needed. Developing and publicizing a meeting schedule allows members to schedule their time and sense the importance and continuity of the group. It also assists in long-range planning.

Term Limitations. Appointments to serve on the committee should be rotated and for definite periods of time. One method of rotating the membership is to replace one-third of the members each year. Usually charter members are selected by lot for terms of one, two, and three years; and, thereafter, members are selected for a full three-year term. A second method is to appoint members for one-year renewable terms. It is valuable to recruit members regularly to bring in new ideas and perspectives and to increase awareness of the partnership in the community. Rotating membership helps prevent burn out.

Knowing the meeting times, dates, and term limitations prior to recruiting members is critical because people typically want to know the expected level of commitment before agreeing to participate in a group.

Identifying Potential Members

Community Partnerships

For the partnership to serve as an effective means of communication and understanding between schools and the community, the membership must be representative of the community. Wide representation enables the group to reflect the points of view of the entire community. Decide which citizens to approach by identifying the people who are most representative of the community or most likely to be strong partners.

In deciding which local businesses to recruit, analyze the local labor market and state or national trends. Examine the local labor market to identify the skills needed for the workplace. List and analyze the categories of stakeholders who should be represented in the partnership. The Chamber of Commerce economic development boards, along with labor organizations, business-professional associations, and business-education coalitions help identify and provide members for the partnerships.

The following list of categories, adapted from the School-to-Work Opportunities Act of 1994, suggests that partnership members be representative of the following areas:

- Employers or employer organizations
- Secondary and postsecondary institutions (teachers, counselors, and administrators)
- Former and current students and their parents
- Labor organizations
- Nonmanagerial employee representatives
- Community-based organizations
- National trade organizations at local level
- Industrial extension centers
- Rehabilitation agencies
- Registered apprenticeship agencies
- Local vocational education entities
- Proprietary educational institutions
- Local government agencies
- Parent organizations
- Teacher organizations
- Vocational student organizations
- Private industry councils/Workforce Development Boards
- Various religious, political, and nationality groups

Identifying Members

Advisory Groups

Vocational Advisory Groups

A vocational advisory group is a more area-specific partnership with a specific focus in a vocational area. When identifying members for a vocational advisory council, the vocational program area is one of the most important factors to consider. For example, if the vocational program area is agriculture, council members' expertise should lie in agriculture or a related area. In addition, a school administrator and teacher serves on the council as nonvoting consulting members. School board members and other school administrators or officials should serve on an ex-officio basis. Parents, former students, and current students also may serve as advisory council members; however, they should be in addition to the members from business and industry.

The size of the partnership will vary by community, type of partnership formed, and scope of the education offering. The group must be large enough to reflect the diversity of the community, yet small enough to be managed effectively. Members may be representative of more than one of the groups listed above. However, members should think of themselves as representing the whole community, not a particular group.

Although many successful vocational advisory councils have ranged in size from five to fifteen members, a community partnership may be much larger. Fewer than five members for an advisory council has been found to limit the council's perspective and resources. An odd number is suggested to follow parliamentary procedure.

Recruiting Members

Recruiting Members

After identifying potential members, the next step is to invite them to serve, which can be done in person or in writing. See Figure 2.2 for a sample invitation letter. Try to obtain the following information prior to approaching prospective members:

- Company history
- Economic impact on local communities
- Industry outlook (forecasts, developments, etc.)
- Related occupations
- Employment outlook (per related occupation)
- History of involvement in partnerships
- Civic leadership (major commitments)
- Educational leadership (major commitments)
- Mission statement
- Strategic goals/objectives (if available)
- A description of the product or service
- Industry designation
- Number of employees
- Unions represented, if applicable

Figure 2.2
Sample Letter of Invitation to Join Partnership

[Partnership Letterhead]

Date

Ms. Jane Doe
Street Address
City, State, Zip Code

Dear Ms. Doe:

Your name has been put forward for membership on the Local (name) Partnership for (name). Your extensive experience and exemplary reputation in the field recommend you highly.

The (name) partnership is composed of outstanding business, educational, industry, and civic members of the community and works to build cooperation between business and education by improving the practical training of its students and participants.

Your demonstrated knowledge of the skills needed to succeed in the current competitive marketplace would be of great value to this partnership. The goal of this partnership is to prepare students and participants to meet these ever-changing demands.

The partnership understands that your time is limited and has planned meetings and member responsibilities to be as purposeful and necessary as possible. The three-year term consists of (number) meetings annually.

On behalf of the (name) Partnership, we invite you to attend the next meeting, scheduled for (date) at (time). If you agree to serve, your term will begin on the first of next month. Please consider this invitation and notify us of your decision by (date). We look forward to working with you on this very important project.

Sincerely,

Administrator/Board Member

Management Team Duties

The following resources may be helpful in gaining information:

- Annual reports and other company literature
- Profiles/stories in local media
- Trade publications
- Employer personnel and public information offices
- Chamber of Commerce
- Current and former employees
- Existing intermediaries/networks
- Area vocational-technical schools
- Surveys
- Interviews with business leaders/representatives conducted by existing partners, including teachers

Once the prospective members have been identified, meet with them individually or send a letter that outlines general expectations for involvement. See Figure 2.3 for a sample member appointment letter.

Outlining Duties of Management Team

In large measure, the success of the partnership depends on the leadership. A management team provides a structure for shared partnership. The management team may consist of a chairperson, vice-chairperson, recorder or secretary, and facilitator.

Election of officers may be either at the last or first meeting of the school year. However, elections held during the last meeting of the school year are preferable for the following reasons:

- The new officers can plan for the next year during the summer and start the year ready to work rather than ready to organize.
- The first meeting of the new year can be reserved for orienting new members and for establishing the work plan for the new year.
- Officers should be selected from among the experienced membership and based upon past performance, which would be easiest to recall at the end of a term rather than the beginning of another year.

The chairperson should:

- Provide leadership at all meetings.
- Demonstrate public speaking and human relations skills and the ability to organize and conduct orderly and productive meetings.
- Demonstrate ability to delegate responsibility as well as willingness to accept responsibility for the group's actions.
- Involve all members in the decision-making process.
- Not be a member or employee of the education agency.

The vice-chairperson should:

- Serve in the absence of the chairperson
- Assist in the planning and developing regular meetings and activities.

The recorder or secretary should:

- Record the minutes of each meeting.

The facilitator should:

- Be a member or employee of the education agency.
- Serve as a liaison between the school and the partnership.
- Assist members in carrying out their goals and purposes.
- Coordinate the logistics of meetings, especially when held on the school site.
- Not direct or assume leadership of the partnership.
- Prepare and mail the minutes, meeting agenda, and correspondence at the direction of the recorder or secretary.
- Arrange for refreshments.
- Manage the budget.

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Figure 2.3
Sample Member Appointment Letter

[Advisory Committee Letterhead]

Date

Ms. Jane Doe
Street Address
City, State, Zip Code

Dear Ms. Doe:

Congratulations on your appointment to the (name) Local Advisory Committee for (program) at (organization). Your three-year term begins on (date). Thank you for your willingness to serve on this important local committee. Your efforts will help keep this program vital and current, and your service will benefit this community.

Your first official meeting as a committee member will be held on (date) at (time). A preliminary agenda and other advisory group information will be mailed to you before the meeting.

On behalf of the (name) Advisory Committee for (program), we thank you again for your interest in serving. We look forward to working with you on this very important project. Please call if you have any questions.

Sincerely,

Administrator/Board Member